



DEPARTMENT OF THE NAVY
HEADQUARTERS UNITED STATES MARINE CORPS
2 NAVY ANNEX
WASHINGTON, DC 20380-1775

MCO 5311.1C
C 53
14 JAN 1999

MARINE CORPS ORDER 5311.1C W CH 1

From: Commandant of the Marine Corps
To: Distribution List

Subj: TOTAL FORCE STRUCTURE PROCESS (TFSP)

Ref: (a) MCO P3900.15
(b) MCO 5300.3
(c) MCO 5320.16
(d) MCO 4400.192
(e) CJCSI 2300.02

Encl: (1) TFSP and Participants
(2) Tables of Organization and Equipment (T/O&E) Change Request Procedures
(3) Glossary of Acronyms and Terms

1. Purpose. This Order establishes CG MCCDC as the total force structure owner (TFSO) and redefines policies, procedures, and standards for the management of the total force structure process (TFSP). Additionally, this Order establishes the role of the functional leader, OccFld manager, MOS specialist, and billet coordinator within the TFSP. T/O's and T/E's are now considered together as tables of organization and equipment (T/O&E).

2. Cancellation. MCO 1300.50, MCO 1500.47, MCO 1500.48, MCO 4400.172A, MCO 5223.1B, MCO 5310.11A, MCO 5311.1B, MCO 5311.5A, MCO 5320.13, MCO 5320.14, MCO 5320.15A, MCO 5400.48, MCO 5401.5, and MCO 12312.2.

3. Background. The TFSP is one of eight highly interdependent processes identified within the combat development system (CDS). The Marine Corps Continuous Process Improvement Program (MCCPIP) resulted in the development of the CDS as described in reference (a). As a process owner, the TFSO is responsible for ensuring that coordination occurs among the functional experts who support or participate in the MCCPIP. Involvement as a process within the CDS requires significant changes in total force structure management procedures to ensure operations are both efficient and

DISTRIBUTION STATEMENT A: Approved for public release;
distribution is unlimited.

14 JAN 1999

effective. This Order describes participant roles, responsibilities, and guiding principles in enclosure (1). Enclosure (2) provides detailed process and T/O&E information, and enclosure (3) provides definitions of TFSP-related acronyms and terms.

4. Summary of Revisions. This Order contains major content and administrative changes. Individuals in HQMC staff agencies, field commanders, and other persons concerned with the TFSP must review the entire Order to become familiar with the new policies and procedures and to apply applicable revisions to assigned SOP's and associated Marine Corps directives.

5. Information. The TFSP provides an optimal force structure for the Marine Corps through the effective integration of decision-making pertaining to Active, Reserve, and civilian billet requirements and equipment allowances. This holistic approach more efficiently ensures units' abilities to perform their operational missions, both in the operating forces and the supporting establishment.

6. Policy. The following fundamental principles of total force structure management are established.

a. Operating force units will be designed into common modules based on required operational capabilities. Because force structure is designed to reflect warfighting requirements, units with the same mission will be identical. Those units with different requirements based on geographic or other constraints will be allocated appropriate manning levels to reflect differences identified in the TFSP. Reserve units will be identical in billet, grade, and skill requirements to their Active Component (AC) counterparts with the same mission, except that varying numbers of billets will be coded as Active or Reserve, depending on the site, to allow for effective integration of the Reserve Component (RC) in the total force.

b. Supporting establishment units, to include reserve site support, will be designed into common configurations based on requirements of units which they support. Those functions common to all bases, stations, and independent sites will be organized similarly. Differences based on geographic location and number of units supported will be determined by quantifying the number of personnel required to support specific functions.

c. A troop list and an authorized strength report (ASR) will provide manning levels of all Marine Corps force structure requirements and will be produced semiannually, normally in February and August. Troop lists will be prepared for all

14 JAN 1999

operating force, supporting establishment, Navy, civilian, and Reserve billet requirements. Troop list manning levels will be determined by the authorized end-strength of the Marine Corps less patients, prisoners, transients, and trainees (P2T2), expressed in man-years for military and work-years for civilians. The ASR will state the authorized strength levels for each organization by MCC, billet grade, and MOS.

d. The T/MR and files within the Logistic Management Information System (LMIS) will be maintained in a timely, accurate manner. The TFSO will make the final determination on any proposed changes to files under TFSO cognizance. This final determination will be made through data entry of all T/O&E changes in the T/MR and the equipment allowance file (EAF) of LMIS.

e. All new billet requirements and equipment allowances for which appropriate offsets have not been identified will be effective the next planned Program Objective Memorandum (POM) cycle (typically 2 to 3 years). Modifications of allowances will be evaluated on a case-by-case basis, depending on the availability of billets to support allowances. Field activities will be notified of the earliest appropriate date in conjunction with the publication of the troop list. Joint or external billets will be effective in the budget year only. Significant unprogrammed initiatives must be presented to the capability assessment council and the program review group and briefed to the executive steering committee for an Assistant Commandant of the Marine Corps decision.

f. Billet requirements in the total force are validated in accordance with authorized end-strengths, grade restrictions imposed by Congress, and the general parameters of closed manpower systems. This should not preclude the identification of an increase in force structure to support a modified or emerging requirement by a hardware or manpower (HARDMAN) or training planning process methodology (TRPPM) analysis. Policy decisions, while impacting inventory management, will not serve as a basis for redefining manpower requirements unless an approved change in unit mission, capabilities, functions, or tasks requires a manpower change that can be identified by grade and skill.

g. The computer systems, hardware, and software referenced in this Order reflect only the current Marine Corps standard. When the standard changes, the TFSO will issue submission requirements based on these changes.

14 JAN 1999

7. Action

a. The TFSO will-

(1) Own and manage Marine Corps total force structure in accordance with the Marine Corps Master Plan (MCMP) and The Commandant's Planning Guidance.

(2) Serve as the focal point for all force structure planning and development, including those initiatives directed by Congress, the Office of the Secretary of Defense, and DOD, e.g., through the implementation of Quadrennial Defense Review recommendations.

(3) Publish all orders and directives pertaining to the TFSP, specifically all Marine Corps 5400 series bulletins. Enclosure (2) of this Order more fully describes situations requiring Marine Corps 5400 series bulletins.

(4) Charter and conduct a total force structure review every two years in consonance with the MCMP and POM planning cycles.

(5) Perform periodic on-site audits of all Marine Corps operating force units and supporting establishment organizations as well as specific functional areas to ensure an appropriate balance between billet requirements and equipment allowances.

(6) Standardize and schedule manpower requirements determination procedures to establish auditable criteria as a basis for Marine Corps requirements. Auditable criteria will include the analysis of equipment allowance levels and will ensure that all new equipment is evaluated for supportability within the existing force structure. Analyses will include the assessment of criteria established by the Navy for Navy-funded aviation equipment and personnel requirements.

(7) Own and manage the T/MR, the troop list file within LMIS, and the EAF within LMIS; publish approved T/O&E's, and equipment allowance changes for Navy-funded equipment; publish a semiannual summary of T/O&E changes in tandem with the publication of the troop list; and publish and maintain the T/O&E files and codes definitions. Enclosure (2) includes T/O&E change request procedures. References (b) through (d) contain additional instructions based on the fleet assistance program policy, joint and external billet management procedures, and LMIS database management policies and procedures as they pertain to

overall logistic readiness.

(8) Conduct periodic reviews of all individual T/O&E change requests without identified compensation to ensure that requests are evaluated with respect to the total force and are prioritized prior to approval or disapproval. Prioritization of requests will be based on force structure policies specified throughout this Order. T/O&E change requests with identified compensation will be staffed and evaluated and, if approved, will not be subject to periodic reviews. Approved compensated requests will normally be included in the next published troop list and EAF.

b. Other process owners, as participants in the TFSP, will review respective interaction responsibilities as described in enclosure (1).

c. Marine Corps Forces, base, and station commanders will submit requests to the TFSO for all activation (establishment), deactivation (disestablishment), relocation, and redesignation initiatives at least 18 months prior to the desired implementation. As part of the request, the initiating command will prepare a facts and justification (F&J) sheet in accordance with the procedures outlined in enclosure (2).

d. After submission of a request by an initiating agency, the Deputy Chief of Staff (DC/S) for Plans, Policies, and Operations (PP&O) (POE), in coordination with the TFSO, will initiate the host nation notification (HNN) process in accordance with the guidance in reference (e). The HNN message release authority will reside with the DC/S PP&O.

8. Recommendation. Recommendations concerning the contents of this Order are invited. Forward recommendations to CG MCCDC (C 53) via the appropriate chain of command.

A large, stylized handwritten signature in black ink, likely belonging to C. C. Krulak, is positioned above the printed name and title.

C. C. KRULAK
Commandant of the
Marine Corps

DISTRIBUTION: PCN 10207823500

Copy to: 7000110 (55)
7230005 (55)
7000093/8145005 (2)
7000099, 144/8145001 (1)



DEPARTMENT OF THE NAVY
HEADQUARTERS UNITED STATES MARINE CORPS
2 NAVY ANNEX
WASHINGTON, DC 20380-1775

MCO 5311.1C Ch 1
CSSE
25 May 2004

MARINE CORPS ORDER 5311.1C Ch 1

From: Commandant of the Marine Corps
To: Distribution List

Subj: TOTAL FORCE STRUCTURE PROCESS (TFSP)

Encl: (1) New page inserts to MCO 5311.1C

1. Purpose. To transmit new page inserts to the basic Order.

2. Action

a. Remove pages 1 and 2 of enclosure (2) to the basic Order and replace with corresponding pages in the enclosure.

b. Remove page A-1 of enclosure (2) and replace with pages A-1 through A-2 contained in the enclosure.

3. Change Notation. Paragraphs denoted with an asterisk (*) symbol contain changes not previously published.

W. L. NYLAND
Assistant Commandant of the
Marine Corps

DISTRIBUTION: PCN 10207823501

Copy to: 7000110 (55)
7230005 (55)
7000093/8145005 (2)
7000099, 144/8145001 (1)



**TOTAL
FORCE
STRUCTURE
DIVISION**

To:

From:

Notes:

Voice Phone DSN 278-3614
FAX DSN 278-6072

14 JAN 1999

TFSP AND PARTICIPANTS

1. TFSP. The TFSP specifies the billet requirements and equipment allowances necessary for the Marine Corps to meet required operational and support capabilities. It also allocates available resources (manning levels and equipment allowances) against those stated requirements through the troop list and EAF. Figure 1-1 shows the typical cyclical flow of the TFSP. The process begins with the determination of a requirement. Then subject matter experts (SME) are consulted to develop an appropriate organizational structure. After the appropriate structure is determined and approved by the TFSO, the organization and the effective fiscal year of implementation is added to the troop list, and actual or planned equipment allowances are updated in the EAF. At the same time that force structure requirement changes are applied to the troop list, manning levels for units are reallocated based on planned Marine Corps end-strength for the fiscal year of implementation. Process owners are notified of changes to force structure through the troop list, Marine

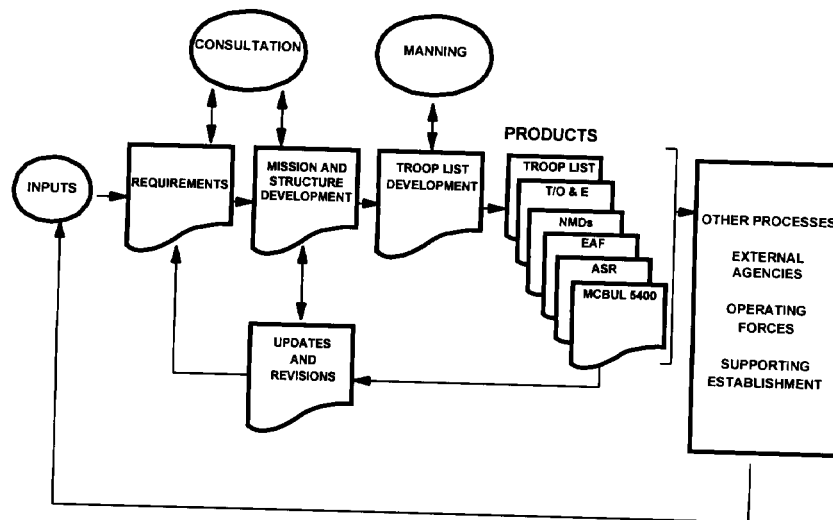


Figure 1-1. TFSP Flow.

Corps 5400 series bulletins, and updated T/O&E's. The Human Resource Development Process (HRDP) and the Materiel Life Cycle Management (MLCM) process require greater detail for manpower and equipment plans and policies. To assist the HRDP inventory managers prepare to meet this requirement, the ASR and Navy manning documents (NMD) are produced to reflect authorized strength by grade, MOS, and MCC. The updated EAF provides the MLCM process sufficient detail for equipment procurement or redistribution actions.

2. TFSP Inputs. Figure 1-2 shows many of the TFSP inputs, principally from the CBRP but also from other sources.

a. Concept Based Requirements Process (CBRP). As the CBRP owner, CG MCCDC generates requirements for personnel and equipment. Under the CBRP, doctrine, organization, training and education, equipment, and support and facilities (DOTES) considerations establish the baseline for current and future requirements of the Marine Corps. The TFSP provides organizational assessments to the CBRP. The CBRP collects and develops concepts and requirements generated and validated through experimentation, Marine Corps Lessons Learned, Fleet operational needs statements, mission area analyses, and directed requirements from external agencies (e.g., the Department of Defense directed requirement

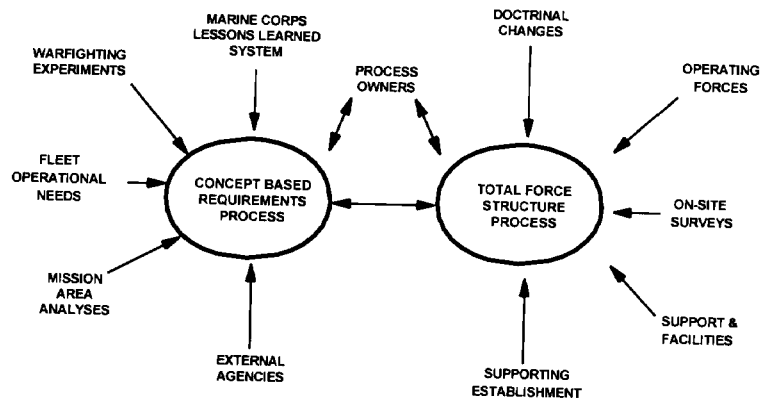


Figure 1-2. Sources of TFSP Inputs.

14 JAN 1999

for force protection), and forwards those requirements to the TFSP. The TFSO is then responsible for developing the detailed force structure subject to limitations by doctrine, support and facilities, and budgetary constraints. The TFSO publishes updated requirements and authorized manning levels in the troop list.

b. Operating Forces and Supporting Establishment. The operating forces and supporting establishment provide input based on respective expertise. When appropriate, force structure personnel perform on-site surveys to provide assistance to units in identifying and developing requirements while ensuring unit commander concerns and operational considerations are analyzed. In all cases, change requests will be consolidated in a T/O&E change request. Procedures for preparing and submitting T/O&E change requests are provided in enclosure (2).

3. TFSP Participants. Many of the TFSP participants are also participants in the CBRP, particularly the commanders of operating forces and supporting establishment organizations. The relationship between the TFSP and the CBRP is clearly delineated in reference (a). The five categories of TFSP participants and respective responsibilities are outlined below.

a. Process Owners. Process owners are responsible for integrating the efforts of respective processes with the goals and objectives of the MCMP. Subsequently, each process owner will participate as a representative on force structure-related process management teams (PMT) as necessary. The PMT's primary objective is to initiate and oversee initiatives to improve work flow and achieve accepted performance goals and to coordinate the shared outcome of functional work efforts. An overview of major interactions between the TFSP and other process owners is provided below.

(1) CBRP Interaction. The CBRP determines the capability requirements of the Marine Corps, develops solutions to meet those requirements, and devises systems to support the capabilities. Within this process, the TFSP receives the capability requirements, reexamines and finalizes force structure solutions to meet the requirements, and updates, maintains, and reviews the T/MR and the LMIS to support the capability. Concept development, deficiency identification, and requirements determination have varying effects on organization. Because each DOTES element is linked with the other elements, the TFSP development of force structure requirements must be considered in unison. A brief synopsis of the TFSP interaction with each DOTES element follows:

ENCLOSURE (1)

14 JAN 1999

is linked with the other elements, the TFSP development of force structure requirements must be considered in unison. A brief synopsis of the TFSP interaction with each DOTES element follows:

(a) Doctrine. Changes in doctrine will be staffed through the CDS to the TFSO to ensure that appropriate structure changes are identified prior to implementation. Changes in doctrine impact a unit's mission and potentially cause changes in billet requirements and/or equipment allowances and vice versa. Mission statements are discussed further in enclosure (2). Reciprocally, proposed changes to force structure will be staffed to Doctrine Division, MCCDC, for potential impacts on Marine Corps doctrine.

(b) Organization. The TFSD provides organizational impact statements on billet requirements and equipment allowances to the Warfighting Development Integration Division, MCCDC, and participates in DOTES assessments. Organizational recommendations are incorporated and consolidated into integrated needs statements (INS), if validated through the CBRP. The INS's serve as inputs into the TFSP for detailed force structure development.

(c) Training and Education. Major changes in training methods that impact force structure, i.e., alternative or distance learning, MOS manual changes, front-end analysis results, SME conference recommendations, and other proposed changes to school course content, will be staffed through the TFSO. Training and education particularly impact the range of individual skills necessary for a unit to perform its mission, and billet requirements must be adjusted accordingly. Changes to individual training standards (ITS), length and frequency of resident professional military education, and other training program initiatives may affect organization and vice versa. Changing MOS requirements within an organization, for example, may cause a major impact on the number of school seats required. Changing ITS may increase or decrease workload requirements of an MOS and may necessitate an increase or decrease in the number of individuals required to accomplish specified tasks within organizations.

(d) Equipment. The TFSO will be included in the staffing of equipment requirements documents to ensure that any potential impacts on organization are addressed. Equipment requirements are derived from the operational needs of Marine

ENCLOSURE (1)

14 JAN 1999

Corps organizations. Equipment needs are initiated through INS's. Requirements Division, MCCDC, initiates the development of concepts of employment and operational requirements documents for new equipment to satisfy those needs as validated within the CBRP. The MLCM process owner develops and procures required items. The TFSP analyzes initial issue requirements and makes determinations on individual requests for modification of allowances (MOA's) (type 3 for supply classes II, IV, and VII) based on a comparative analysis of like units, force structure available to support the requested item, and staffing comments received from functional leaders, process owners, and others as applicable. In determining MOA's, a comparison of like units will be balanced by the unique requirements that the unit must support. Changes to maritime prepositioning ships equipment allowances, Norway airlanded Marine expeditionary brigade allowances, enhanced equipment allowance pool allowances, depot maintenance float allowances, and war reserve materiel allowances will also be staffed via the TFSP. Enclosure (2) contains details for requesting changes to equipment allowances.

(e) Support and Facilities. Responsibility for support and facilities falls under the purview of the DC/S Installations and Logistics (I&L), as the infrastructure management process owner. The DC/S I&L provides supportability estimates to the TFSP on requests for changes to force structure. Changes to the location of facilities or the number of units assigned to particular locations necessitate review of the billet requirements and equipment allowances necessary to perform the same functions under different conditions.

(2) Resource Allocation Process Interaction. As the Resource Allocation Process owner, the DC/S, Programs and Resources (P&R), makes recommendations to the CMC on total resource allocation and provides the TFSO and HRDP owner, DC/S, Manpower and Reserve Affairs (M&RA), with the total end-strength of military and civilian personnel available for allocation and the funding for equipment and facilities programs.

(a) The DC/S M&RA converts the authorized military end-strength into available man-years and subtracts the estimated number of patients, prisoners, transients, and trainees (P2T2). The TFSO then determines the allocation of the total available manning and equipment allowance levels against the total requirement through the preparation of the total force troop list.

ENCLOSURE (1)

14 JAN 1999

(b) Force structure represents the unconstrained requirement for the number of people and pieces of equipment necessary to accomplish the Marine Corps wartime mission, i.e., it may exceed the monetary resources available to man and equip the structure requirement. Therefore, T/O&E's state the Marine Corps total requirement for personnel and equipment. Planning for necessary resources to accomplish missions and requirements takes place during the Planning, Programming, and Budgeting System (PPBS) process. The POM submission is part of the PPBS. The POM allocates fiscal resources based on priorities for 6 years (the budget year and the following 5 years).

(3) HRDP Interaction. As the HRDP owner, the DC/S, Manpower and Reserve Affairs (M&RA), is responsible for human resources.

(a) The HRDP develops the annual manpower plan and staffs the plan to the TFSO for review and comment. The TFSP defines the personnel grade and MOS requirements which drive the HRDP. Organizational changes directly impact the requirement for personnel and equipment allowances. These changes must be scrutinized with respect to the time required to recruit, train, and equip each individual Marine and to ensure the inventory can meet the requirement. Manning, staffing, and equipping policies directly impact the on-board strength of Marines, Sailors, and civilians. Similarly, manpower plans and policies which cause changes in inventory availability must be considered in the manning allocation.

(b) The HRDP manages the current inventory of personnel and assigns those personnel to organizations based on stated requirements (T/O&E) and respective organization allocation of manning (troop list and ASR). One month prior to troop list production, the DC/S M&RA will provide the TFSO with the military (Active and Reserve) man-years available for allocation. Budgetary reality predicates the need to allocate the total number of personnel, as stated in end-strength terms, against requirements stated in the T/MR. Overhead costs (P2T2) are subtracted from the authorized end-strength and the remaining available end-strength, expressed in man-years (work-years), is allocated to organizations throughout the Marine Corps. Manning allocation is specified in the troop list, published semiannually in February and August for the current year, the execution year, and the

ENCLOSURE (1)

14 JAN 1999

following 5 out-years. The execution year's allocated manning levels are then applied to the actual billet requirements for specific units in the ASR. The ASR, also produced semiannually in conjunction with the troop list, authorizes strengths based on unit requirements for individual grades and MOS's. The ASR's are forwarded to DC/S M&RA who then compares actual assignable inventory with authorized strengths and prepares a staffing goal for the current year. Allocations by grade and MOS for the out-years are also published in the ASR. This report is then converted to the grade adjusted recapitulation after adding in the estimated mix of P2T2 for use in developing training input plans, promotion plans, and accession plans. These future plans directly affect the shape of the current inventory, which in turn affects the next troop list submission. Civilian funding is generated by the DC/S P&R.

(c) Overhead costs are different for the Reserve Component (RC). These costs consist of Active Reserve (AR) billets, non-prior service trainees (Category "F" and "P"), and other requirements (Category "B") in support of the AC. Unlike the AC, some of these costs are not subtracted from the RC authorized end-strength. For example, one-sixth of Category "F" reservists train in split-increments over two summers. These reservists, though nondeployable, are assigned and drill with respective units and are included in unit manning levels as computed for end-strength. Like the AC, those costs subtracted from the authorized RC end-strength result in the allocation of remaining available end-strength to the RC and AC organizations throughout the Marine Corps. For the RC, this translates to the RC unit's portion of end-strength; for the AC, it translates as the individual mobilization augmentee (IMA) portion on AC T/O&E's.

(d) The TFSO and DC/S M&RA will work together to ensure the inventory of Active and Reserve Marines meets the total force structure requirements. Billet requirements must be determined, and manning controls must be applied, with the real inventory of personnel in mind. Unconstrained operational requirements will yet outweigh concerns over inventory fluctuations. The TFSO and DC/S M&RA will review biennially the necessity for grade shaping to balance personnel inventory and billet requirements. If required, grade shape reviews will be coordinated jointly by Manpower Policy Division, M&RA, and TFSD, MCCDC.

ENCLOSURE (1)

Separate reviews of officer and enlisted populations will be conducted

(e) The troop list provides HRDP visibility over programmed allocation of manpower dollars against requirements. Manning of Marine Corps T/O&E's at levels below 100 percent of stated requirements is necessary and authorized due to externally imposed requirements, budgetary mandates, and end-strength availability. The changing nature of structure, cyclical recruit accession phasing, programmed school quotas, and unanticipated personnel losses prohibit the full staffing of all billets authorized for manning. The net effect is that most organizations must operate with actual staffing less than that prescribed in the unit's T/O&E. To the maximum extent possible, however, every command will be staffed to programmed requirements as indicated by the ASR.

(4) MLCM Process Interaction. The Commander, Marine Corps Materiel Command, is the MLCM process owner.

(a) In conjunction with MLCM process owner, the TFSO reviews all requirements documents and provides supportability assessments on subsequent equipment fielding plans. The TFSO participates on integrated product teams and makes recommendations at each milestone decision review on all force structure implications in the acquisition process. Equipment acquisition may or may not directly impact the number of personnel required in an organization. During the initial phase of equipment procurement (milestone 0), the Commander, Marine Corps Systems Command (COMMARCORSSYSCOM) conducts a HARDMAN or TRPPM analysis to determine projected manpower impacts of equipment acquisition.

(b) The TFSO will conduct biennial T/O&E reviews to validate and balance billet requirements and equipment allowances for Marine Corps units. The TFSO will also modify T/MR and LMIS data bases based on review results. The TFSO does not set the allocation priorities for fielded equipment, nor does the TFSO modify equipment allowances based on on-hand quantities of equipment, with the exception of modifying planned allowances as actual allowances. The MLCM process owner will ensure that equipment excesses or deficiencies are resolved through redistribution actions. In addition, the MLCM process owner will staff equipment fielding priority documents to the TFSP which documents the equipment allowances in the LMIS as either planned or actual.

ENCLOSURE (1)

14 JAN 1999

(c) Requirements Division, MCCDC, DC/S I&L (LP/LF), COMMARCORSYSCOM, and Commanding General, Marine Corps Logistics Bases (COMMARCORLOGBASES), provide the TFSO with supportability assessments on recommended changes to equipment allowances.

(5) Infrastructure Management Process Interaction. As the process owner of infrastructure management, DC/S I&L (LFL) publishes an annual facilities and support requirements (FSR) document which provides a 6-year forecast of personnel and equipment base-loading projections. The FSR is used by installation facilities planners to ensure current or proposed infrastructure will satisfy future requirements. The TFSO provides DC/S I&L (LFL) with detailed information on current and planned force structure initiatives to include Marine Corps 5400 series bulletins, published T/O&E's, troop lists, and ASR information.

(6) Service Advocacy Process Interaction. The TFSO provides the service advocacy process owner, DC/S PP&O, with force structure requirements and manning levels available for operations. The TFSO also participates in the service advocacy process to attain a total force perspective and to ensure the Marine Corps units can meet specified missions. Planned deployment and employment of forces in current operational plans provide the TFSO with a mechanism to assist the HRDP and MLCM process owners in the prioritization of personnel inventory management decisions and equipment distribution or redistribution decisions. Additionally, decisions on whether or not to place units in the Active Component or the Reserve Component directly relate to the service advocacy process.

(7) Information Management Process Interaction. The TFSO provides the information management process owner, Assistant Chief of Staff (AC/S), Command, Control, Communications, Computers, and Intelligence (C4I), with the force structure requirements for automated information system support. The TFSP and information management process owners also coordinate respective implementation plans in support of the MCMP.

b. Functional Leader. Functional leaders serve as TFSP primary points of contact and spokespersons for their specific area(s) of functional and organizational expertise. The particular ranges of T/O&E numbers represented by various functional leaders will be published in a MCBul 5320 on an annual basis.

ENCLOSURE (1)

Functional leaders are also assigned responsibilities as major participants in the CDS, as stated in reference (a). As participants in the TFSP, functional leaders will --

(1) Provide expertise and advice to the TFSO regarding changes to assigned mission statements or unit level T/O&E changes based on occupational expertise.

(2) Participate in Marine Corps-wide reviews and development of mission statements for T/O&E's which relate to respective MAGTF elements.

(3) Participate in the development of T/O&E personnel structure and equipment allowance changes.

(4) Participate in the determination of manning priorities for the current troop list when necessary.

(5) Participate in the review of the ASR to ensure that allocated manning by grade and MOS meets the manning levels authorized in the troop list as well as the needs of respective MAGTF elements.

(6) Provide expertise in the management of grade structure.

c. Occupational Field (OccFld) Manager. An OccFld manager is a DC/S, AC/S, department head, or division director of HQMC, MCCDC, Marine Corps Recruiting Command (MCRC), or COMMARCORSYS-COM. OccFld managers assignments will be published annually by CG MCCDC in a Marine Corps 5320 series bulletin. OccFld managers are assigned purview over a grouping of MOS's or a specific Category B MOS. In that capacity, the OccFld manager will--

(1) Serve as the principal point of contact between the TFSO and the Marine Corps with regard to force structure requirements, intended structure changes, and unique operational considerations that may affect force structure and result in OccFld assignment actions.

(2) Designate in writing all MOS specialists under their cognizance to the TFSO, by 30 September annually, for inclusion in MCBul 5320 which is published each October.

ENCLOSURE (1)

14 JAN 1999

(3) Assist in the development, implementation, and revision of force structure initiatives by providing advice, information, proposals, and evaluations for assigned OccFld's and MOS's.

(4) Review proposed T/O&E changes with appropriate MOS specialists, and provide comments and recommendations on support- ability of proposed changes from commands, activities, and staff agencies directly related to assigned OccFld's.

(5) Assist other process owners by providing OccFld expertise and assistance relating to manpower and equipment initiatives.

(6) Revise applicable directives related to respective OccFld's to ensure that impacts on force structure are noted.

(7) Advise the DC/S P&R and TFSO on manpower and equipment initiatives relating to respective OccFld's for inclusion in POM submissions as necessary.

(8) Review and approve formal school training requirements changes for the training input plan (TIP) that are submitted (via the DC/S M&RA (MPP-80) for entry level schools) by MOS specialists before forwarding the changes to CG MCCDC (C463FT). Changes to training plans which impact force structure will be coordinated with the TFSO.

d. MOS Specialist. An MOS specialist is the SME for a specific MOS or a group of similar MOS's. MOS specialists will be assigned by OccFld managers, and a by-name listing will be published annually in a Marine Corps 5320 series bulletin. MOS Specialists will-

(1) Serve as technical advisors to OccFld managers by assisting in the classification, training, and assignment of personnel within an MOS.

(2) Refer MOS proposals from commands and activities to the TFSO for appropriate action. The MOS specialist will provide comments and recommendations on the proposals to the TFSO via the OccFld manager.

ENCLOSURE (1)

(3) Serve as the focal point of contact for training requirements and ensure that the TFSO is involved in the initiative should the review of any training requirements result in force structure action.

(4) Determine requirements for formal training that do not result in a new primary MOS and forward such requirements to CG MCCDC (C463FT) during annual TIP solicitations.

(5) Review and comment on all primary MOS training requirements (initial and skill progression) produced by DC/S M&RA (MPP) prior to sending the requirements to CG MCCDC (C463FT) for inclusion in the TIP.

(6) Review MOS training tracks to ensure program of instruction accuracy and efficiency and, if necessary, initiate change requests.

(7) Participate in the development, review, and revision of individual training standards, course descriptive data, and programs of instruction.

(8) Initiate and review requests to create new formal courses of instruction to support an MOS or OccFld.

(9) Ensure current Marine Corps orders and bulletins accurately reflect MOS duties, tasks, and prerequisites. The MOS specialist will submit recommended MCO P1200.7 (MOS Manual) additions or revisions to the CG MCCDC (C461).

(10) Review and submit specific non-primary MOS training requirements and training allocations to CG MCCDC (C463FT) for inclusion in the TIP, and recommend to DC/S M&RA (MM) by-name assignments for such allocations.

(11) Serve as the principal agent responsible for recommending MOS grade structure modifications during MOS enlisted and officer grade structure reviews coordinated by TFSO and DC/S M&RA (MPP). MOS specialists will ensure that parent Marine Corps Forces, base, or station commanders are afforded the opportunity to provide comments or recommendations on proposed changes prior to submission for approval. The TFSO will adjudicate unresolved nonconcurrences between MOS specialists, HQMC agencies, and unit commanders.

ENCLOSURE (1)

14 JAN 1999

(12) Assist other process owners by providing MOS specialist expertise and assistance to manpower and equipment initiatives (i.e., budgetary justifications for special MOS-related pay or the development and review of staffing goal models and dictionary definitions and model).

e. Billet Coordinator. A billet coordinator is an agency or individual responsible for coordinating billets external to the Marine Corps or within the supporting establishment. Actions required for external billets are outlined in reference (c). Billet coordinator assignments are based on commonality of function performed. For example, Training and Education Division, MCCDC, is the billet coordinator for schools and instructor billets. Where more than one agency may represent a function in a T/O&E, all will be consulted by the TFSO. Billet coordinators will--

(1) Perform the same duties as a functional leader for specified units or functions on a unit T/O&E.

(2) Coordinate force structure initiatives with base or station commanders, OccFld managers, and MOS specialists prior to forwarding the initiatives for TFSO decision.

4. TFSP Outputs

a. T/O&E. The TFSO publishes the T/O&E semiannually in conjunction with the troop list. Currently, two separate systems exist for organization and equipment, but an initiative is underway for a single common system which combines the two component data bases. In the interim, T/O's represent the manpower requirement in number of billets by grade and MOS, while the T/E's represent the planned and actual equipment allowances for each unit. Organizational changes are reflected in the data base as changes are approved; equipment changes are updated in the data base on a quarterly basis. Both tables will be published together on a semiannual basis to establish a single reference point for T/O&E comparisons and force structure planning and development. For specific descriptions of the fields available in both data bases, refer to the most recent users manuals published by the TFSO.

b. The Total Force Troop List. The TFSO determines the troop list manning levels based on the authorized end-strength of the

ENCLOSURE (1)

14 JAN 1999

Marine Corps less P2T2 expressed in man-years (work-years). The TFSO prepares troop lists semiannually, normally in February and August, for all Marine Corps (AC and RC), Navy, and civilian operating force and supporting establishment organizations. The troop list reflects force structure numbers in the T/MR for the fiscal year indicated. Structure numbers are divided into gross officer and enlisted billet requirements. The troop list also reflects manning, in officer and enlisted terms, applied to force structure numbers.

c. Authorized Strength Report. The ASR represents the baseline document for all manpower staffing, inventory management policies, and manpower plans. The ASR is produced by a computer-generated manning level process model (MLPM). MLPM uses inputs from the T/MR unit file and T/O&E as well as the troop list to produce the ASR which states authorized strength levels by MCC, billet grade, and MOS.

d. Reports to Other Agencies. The TFSO compiles and prepares all force structure related reports requested by external agencies. The TFSO also prepares and submits budget submissions pertaining to force structure requirements and end-strength distributions by various funding categories.

e. Comments on Staffing Documents of Other Agencies. TFSO will provide comments on DOTES changes. The TFSO will participate in any PMT's chaired by other process owners which involve initiatives having potential impacts on force structure. These include, but are not limited to, force readiness assessment program issues and equipment requirements documents (CBRP), equipment distribution and fielding documents (MLCM), proposed changes to personnel inventory or training management (HRDP), and major changes to base or station infrastructure plans.

ENCLOSURE (1)

TABLE OF ORGANIZATION AND EQUIPMENT (T/O&E)
CHANGE REQUEST PROCEDURES

1. Introduction. An organization's force structure consists of the unit mission statement and T/O&E. Before a T/O&E can be changed or created, a new mission statement and associated functions must be developed. There are three categories of T/O&E change requests: unit-level changes, line-level (billet or equipment item) changes, and information system design administrative changes. Commanders requesting T/O&E changes should review the actions, considerations, and procedures contained in this enclosure before submitting requests.

* 2. Mission Statement

a. Every T/O&E contains the unit's mission statement. The mission statement is a concise statement of the unit's war-fighting responsibilities in relation to other organizations, and it describes the unit's role in support of MAGTF, Supporting Establishment and Joint Operations. In addition, the mission statement drives the organization of the T/O&E as well as the number of billets and essential equipment required for the unit to accomplish its mission.

b. Advocates are required to provide detailed input in creating and updating mission statements within their purview. Advocates will ensure that every T/O&E has a mission statement. A mission statement will be developed whenever a new unit is created and a T/O&E's is established. Mission statements should be modified or validated whenever a T/O or T/E is significantly modified or when a unit's mission changes. All T/O&E changes must be submitted to The Deputy Commandant, Combat Development, Total Force Structure Division (TFSD) for processing.

c. A standardized format is contained in appendix A of this enclosure and contains information required in the mission statement.

d. Units that have not undergone changes to their TO/Es or mission must have their mission statements reviewed and updated as required every 4 years. TFSD will initiate the validation process by notifying the responsible advocate that their mission statement requires validation.

e. Mission statements should focus upon the unit's wartime capabilities. Mission statements must be based upon doctrine and mirror image like units within the Marine Corps, inclusive of the Marine Corps Reserve. They should be written to provide definition, structure and employment as it supports the MAGTF commander. Unit mission statements should not be written in such specific form as to take away a commander's flexibility for employment of the given unit.

3. Unit-Level Changes

a. Unit relocations or reorganizations will be authorized only after a cost-versus-benefit analysis indicates that the intended force structure action will result in a net improvement in the unit's operational effectiveness. The cost-versus-benefit analysis must account for any additive costs and their source. CBRP review of DOTES provides the venue for the cost-versus-benefit determination.

b. Implementation of requirements-based force structure decisions is directed via a TFSO-issued Marine Corps 5400 series bulletin. Force structure actions may take the form of relocations, activations, deactivations, establishments, disestablishments, redesignations, realignments, or adjustments to current and/or future force structure. A Marine Corps 5400 series bulletin is required whenever modifications or changes to Marine Corps force structure result in a change to organizational capability, mission, or concept of employment. Depending on the scope, the change may require SECNAV notification and approval.

c. Selected Marine Corps Reserve (SMCR) unit structure is included in the operating forces with the mission of augmenting and/or reinforcing the AC. During consideration of unit-level changes, the ability of the unit to meet the SMCR's mission of augmenting and/or reinforcing the AC, as well as recruiting and retention factors based on geographical location, must be taken into account. When local demographic conditions are not capable of providing sufficient manpower to support the SMCR unit T/O&E requirements, combat capabilities will be maintained by realigning structure to similar units in different locations that can support the training of the Marine and support the requirements of the unit to which attached. This "site-lining" of individual billets requires a T/O&E change request to ensure adequate accountability of all requirements at separate locations.

d. The location and organization of operating forces are primarily determined by operational factors. The establishment, disestablishment or significant modification of supporting establishment (ashore) activities always require SECNAV approval. Additionally, any congressional interest issues regarding operating force or supporting establishment organizations must be addressed. SECNAVINST 5700.9 (Congressional Notification and Public Announcement Procedures Concerning Base Closures, Contract Awards, and Other Actions Having Significant Economic/Personnel Impact) and SECNAVINST 5450.4 (Establishment and Disestablishment of Shore (Field) Activities of the Department of the Navy) provide guidance.

e. Commanders requesting authority to establish, disestablish, or make significant structure changes to supporting establishment (shore) activity must draft and submit a fact and justification (F&J) letter as specified in SECNAVINST 5450.4 and SECNAVINST 5700.9 and in the format prescribed in appendix C of this enclosure. The F&J letter format will also support operating force structure actions. The purpose of the F&J letter is twofold. It provides a means for requesting approval from the SECNAV and a means of legislative notification for impending actions.

f. Structure changes must comply with the requirements of the National Environmental Policy Act of 1969 and other applicable federal, state, and local statutes and regulations. National Environmental Protection Act documents required for executing the force structure action will accompany the F&J.

g. The TFSO will ensure F&J letters are finalized and submitted to the SECNAV for approval.

h. Although SECNAVINST 5700.9 provides the specific circumstances under which a F&J letter is required, care must be taken to determine if a proposed action that does not meet the established criteria will have legislative interest. Special consideration should be given to the potential for political or economic impact (e.g., moving a Reserve Center across state lines). In such cases, legislative interest should be presumed and F&J letters must be prepared and forwarded.

i. CMC, Office of Legislative Affairs (OLA), clears any release of information outside the Marine Corps concerning the identification of specific units or geographical locations affected by force structure changes prior to official release of appropriate implementation instructions.

j. The TFSO will staff proposed F&J letters in conjunction with staffing Marine Corps 5400 series bulletins. Staffing informs CMC (OLA) of pending actions requiring congressional notification. When staffing is completed, the TFSO will advise CMC (OLA) when F&J letters are forwarded via CMC for SECNAV approval. Once the F&J letter is signed by SECNAV, TFSO will forward approved F&J letters to CMC (OLA) for notification action.

k. CMC (OLA) will forward congressional notification of structure actions to SECNAV for readressal to SECDEF, JCS, and Members of Congress prior to public release of information.

l. TFSO will release force structure bulletins after CMC (OLA) confirms that congressional notification has been completed.

m. The DC/S PP&O (POE), in coordination with the TFSO, will draft the host-nation notification message for release by the

ENCLOSURE (2)

14 JAN 1999

DC/S PP&O to the State Department. It is not desirable nor is it the responsibility of HQMC, CG MCCDC, or field commands to notify foreign governments of force structure changes or their impacts.

n. Unit-level force structure changes will be programmed in the current POM cycle for an out-year at least one fiscal year in the future. This ensures that the unit(s) affected will have sufficient funds and manpower to absorb the fluctuations in operation and maintenance costs and personnel turbulence. This designation also allows the manpower and equipment processes a full year to establish viable plans for manning, staffing, and equipping the unit.

o. All unit-level force structure actions will be programmed to be effective the first month of a fiscal year (October). The Marine Corps Forces, base, or station commander will determine the actual date of execution within the fiscal year of the programmed action. This provides the commander the opportunity to schedule the execution around operational commitments, training, and availability of facilities.

p. Within 30 days of receiving a Marine Corps 5400 series bulletin, the Marine Corps Forces, base, or station commander authorized unit-level changes will provide the TFSO with a letter of instruction (LOI). The LOI will outline the timelines for required actions which will include, but not be limited to, the following:

(1) Administration. Conduct personnel planning, scheduling, receiving, and assignments. Effect intra-organization transfers of medical hold and disciplinary cases as necessary. Initiate general administration for new units until they are capable of self-administration. Provide morale and welfare services as required.

(a) Chronological Records

1 Ensure all required records are maintained per SECNAVINST 5212.5C (Navy and Marine Corps Records Disposition Manual).

2 Forward temporary records not required to an approved Federal Records Center (FRC). Permanent records not required should be forwarded to the Washington National Records

ENCLOSURE (2)

14 JAN 1999

Center (WNRC). Inform CMC (ARAE) of the volume of records by cubic feet that will be transferred to FRC or WNRC. Refer to MCO P5210.11 (Records Management Program for the USMC) for further guidance.

3 Coordinate the transporting, safeguarding, and storing of classified documents and material per MCO P4400.82 (Marine Corps Unified Materiel Management System Controlled Item Management Manual).

(b) Publications

1 Ensure that the address reflected in the on-line Marine Corps Publications Distribution System is updated and that The publications list contains only mission-essential publications. Review SL-1-2/1-3 (Index of Publications Authorized and Stocked by Marine Corps) and NAVMC 2761 (Catalog of Publications) before ordering publications.

2 Forward unit individual activity codes change requests to CMC (ARDE) in accordance with MCO P5600.31 (Marine Corps Publications and Printing Regulations). Maintain controlled publications in accordance with procedures established in OPNAVINST 5510.1 (Department of the Navy Information and Personnel Security Program Regulation).

(c) Status of Resources and Training System (SORTS). Prepare SORTS reports per MCO P3000.13 (Marine Corps Status of Resources and Training System Standing Operating Procedures) and Joint Publication 1-03.3 (JRS, Status of Resources and Training System [SORTS]). Coordinate specific reporting instructions for the type of unit action being implemented with CMC (POE-30).

(d) Personnel Actions

1 Update service records of individuals affected per MCO P1070.12 (IRAM).

2 Prepare unit diary entries for activations, deactivations, relocations, redesignations, and reorganizations per MCO P1080.40 (Marine Corps Total Force System Personnel Reporting Instruction Manual). Coordinate timing of applicable entries with CMC (MIFD).

ENCLOSURE (2)

3 Request update of the activity address code (AAC) in accordance with MCO 4420.4 (Department of Defense Activity Address Directory).

(e) Historical Actions. Ensure annual historical reports address changes are made to CMC (HD) per MCO P5750.1 (Manual for USMC Historical Program). Procure or dispose of a unit's organizational standard, battle standard, national colors, and other heraldic items per MCO P10520.3 (Flag Manual).

(2) Intelligence and Communications. Assemble and maintain threat information and promulgate intelligence instructions.

(a) Communications Security (COMSEC) Material System (CMS). Coordinate CMS requirements for active duty, tactical accounts with immediate superior in the chain of command (ISIC) and supporting Marine expeditionary force (MEF) COMSEC Management Office (MCMO) per CMS 1 (Communications Security Material System [CMS] Policy and Procedures Manual) or CMS 21 (CMS Policy and Procedures for Navy Tier 2 Key Management System). Per CMS 1 or CMS 21, coordinate CMS requirements for reserve units with the Commander, Marine Corps Forces Reserve (COMMARFORRES), and coordinate CMS requirements for garrison commands with ISIC and CMC (CSB).

(b) Plain Language Address. Ensure that a communication guard shift is published for the unit-level action taking place in accordance with the NTP-3, Supplement 1K (Address Indicating Group and Collective Address Designator Handbook).

(3) Training. Prepare training directives, training guidance, and syllabi for new units. Maintain essential training publications and directives for issue to new units. Provide training assistance and supervision as required. Provide initial supervision of new unit training. Plan and obtain school quotas and amphibious training commitments for fleet and other service activities.

(4) Logistics. Plan and schedule logistics support for the unit-level force structure action. Provide assistance in establishing logistic functions within unit involved. Provide instructions and assistance in embarkation planning if applicable.

ENCLOSURE (2)

14 JAN 1999

(a) Supply. Plan and conduct follow-up action for the supply support required as a result of the force structure action. Establish or update and maintain supply records on materiel requisitioned and received. Maintain liaison with receiving and storage agencies. Schedule and supervise delivery of materiel to using units. Report supply actions per Users Manual 4400-123 (Fleet Marine Force [FMF] Supported Activities Supply System Using Unit Procedures) and MCO P4400.150 (Consumer Level Supply Policy Manual).

(b) Facilities. Ensure availability of facilities to support units involved in force structure actions. Inform the activity site installation commander of the mission and tasks assigned to the activity and the unit's anticipated equipment and personnel load. Coordinate efficient use of facilities by publishing a list of milestones to establish the unit. Refer to MCO P11000.12 (Real Property Facilities Manual, Volume II) for planning and programming facilities on Marine Corps installations procedures and guidelines.

(c) Materiel. Establish and follow realistic required delivery dates to provide time for unpacking, inspection, and processing. Build up materiel in an orderly manner to allow time for adequate supplies to be on-hand and issued in advance of scheduled training or operations. Update logistics readiness data in accordance with MCO P4790.2 (Marine Integrated Maintenance Management System Field Procedures Manual) and MCO 3000.11 (Marine Corps Ground Equipment Resource Reporting [MCGERR]). Handle weapons in strict compliance with MCO 8300.1 (Marine Corps Serialized Control of Small Arms Systems).

(5) Fiscal Actions. Continue to refine financial planning, budgeting, and management for units prior to unit-level actions. Provide disbursing services as required. Identify the source of funding (Operations and Maintenance, Marine Corps/Operations and Maintenance, Marine Corps Reserve [O&MMC/O&MMCR]) for the unit-level force structure action, initial issues, continuing operations, and the expense operating budget prior to publication of a Marine Corps bulletin authorizing the action.

(6) Environmental Actions. Ensure restructuring complies with the environmental planning requirements of the National Environmental Policy Act and other applicable statutes and regulations.

ENCLOSURE (2)

14 JAN 1999

4. Line-Level Changes. The capability of the manpower planning and staffing process to react to constant and widely fluctuating changes is limited. Recruiting, training, and promotion plans are developed on the basis of a Marine Corps of a certain form and content at a specific point in time. Planning for future requirements and using the out-year T/O&E's to reflect these requirements ensures timely assignment of Marines. The TFSO must validate the request and make adjustments to T/O&E's in the T/MR and LMIS prior to the implementation of personnel (assignment) or equipment (redistribution) actions. This ensures accession, training, assignment of personnel, and acquisition/distribution of equipment support respective force structure changes and readiness reporting.

a. Originating Command Reviewing Process. When an originator forwards a T/O&E change request via the chain of command, each reviewer in the chain must validate the request and attempt to balance new requirements with current billet requirements and equipment allowances. Upon completion of analysis and evaluation, the reviewer forwards any unfulfilled portion of the requirement to the next level in the chain of command where the validation process is repeated. The necessity for thoroughness cannot be overemphasized, since the Marine Corps manpower management system relies on the ability of each command level to ensure requests are valid. T/O&E changes will not be based on fluctuation of manning levels, variations in the level of proficiency in individual skills within particular MOS's, and types and quantities of personnel or equipment on hand. The originator and each successive reviewer must examine the T/O&E change request to ensure--

(1) Work to be performed by the new billet requirement is essential and contributes to the unit's ability to accomplish its assigned mission.

(2) New billet requirements reflect the minimum number of personnel needed to accomplish assigned tasks and functions and are consistent with accomplishment of these functions. This determination must be based on existing criteria, other work measurement standards, experience data, or investigative studies.

(3) The unit is performing work essential to mission accomplishment.

ENCLOSURE (2)

14 JAN 1999

(4) Compensatory reductions that generate sufficient structure by grade and MOS to meet new requirements have been identified. Modifications that involve increases in billet totals, grade levels, and type changes require the identification of compensatory reductions. The compensation must be of the same type (i.e., military officer for military officer, enlisted for enlisted, and Navy for Navy) and must fit within acceptable grade shape parameters for MOS's involved. Compensation is normally required for civilian changes, although civilian billets may still be added if the addition can be accommodated within the available funding resources. Coordination with OccFld managers may be required to ensure that modifications to enlisted or officer MOS's are within the parameters of the enlisted or officer MOS grade structure parameters. A restricted officer billet may not be used as compensation for an unrestricted officer billet and vice versa. Requests for additional equipment will require recommended compensatory reductions to source increases in equipment allowances. Change requests without compensation will be held in abeyance, prioritized, and acted upon in conjunction with semiannual reviews.

(5) Specific efforts to increase current work force productivity by simplifying systems, eliminating marginal functions, and/or consolidating functions are made prior to requesting additional billets.

b. Operating Force Units. T/O&E's for an operating force unit reflect billet requirements and equipment allowances based on current concepts of unit employment across the full range of military operations.

(1) Operating force commanders requesting T/O&E changes must forward requests concurrently to the TFSO and to force commanders of like units for comments and recommendations.

(2) Upon receipt of the change, the TFSO will staff the request to applicable agencies for comments and recommendations. When all commanders and agencies concur and compensation is identified, the changes will be entered in the T/O&E. When nonconcurrence exists, the TFSO weighs all comments and recommendations and makes a final decision.

c. Supporting Establishment Units. T/O&E's for supporting establishment units display both military and civilian billets as

ENCLOSURE (2)

14 JAN 1999

well as equipment allowance requirements. Because T/O&E's are requirements documents not constrained by funding, some listed civilian billets may not be funded.

(1) Funded civilian requirements are reflected in letters of allowance (LOA) for each activity. Validation of both funded and unfunded civilian billets allows the supporting establishment activity commander maximum flexibility to meet functional requirements.

(2) T/O&E's will be updated regularly to reflect actual requirements based on decisions made by supporting establishment commanders in the execution of LOA's.

d. Billet Change Considerations and Actions

(1) Reserve Billets. Different legislative policies for the RC, the responsibilities of the DC/S M&RA and COMMARFORRES, and the mission of the RC to augment and/or reinforce the AC require additional considerations and actions when determining structure requirements. The following key points are provided to assist in correctly determining RC requirements.

(a) Active Reserve (AR) Billets. The AR Program authorizes full-time, active duty Reserve personnel to assist in organizing, administering, recruiting and retaining, instructing, and training members of the Marine Corps Reserve (MCR). AR billets are categorized by the functions they perform. In validating AR structure, the TFSO will determine if the billet(s): (1) provides one or more of these functions in order to be approved; (2) falls into the area of career or limited tour designation; and (3) meets current funding ceilings, grade authorizations, and compensation criteria (if required). Career Force billets allow a progression through positions of increasing responsibility and skill requirements, appropriate for the grade held, for possible military retirement after a minimum of 20 years of active Federal service (i.e., they have a career path). Limited tour billets do not have a career path. Like the AC, a limited number of field grade officers may be on active duty in the AR program as of the end of the fiscal year. Therefore, when identifying compensation for an officer billet, a field grade billet must be offered for another field grade billet.

ENCLOSURE (2)

1 Title 10 U.S.C., Section 265 Billets. These billets are established and located at the seat of the Government or within HQMC and at the headquarters of major commands where organizational missions include responsibility for Reserve affairs. These billets will be designated as additional staff with assigned duties preparing and administering the policies and regulations affecting the MCR.

2 Title 10 U.S.C., Section 672(d) and 678 Billets. These billets are established for organizing, administering, instructing, training, or recruiting the MCR component.

(b) IMA Billets. The IMA Program authorizes individual military billets to augment AC structure of the DOD or other departments or agencies of the U.S. Government to support mobilization (including pre- and/or post-mobilization) requirements, contingency operations, military operations other than war, or other specialized or technical requirements. The TFSO will validate, prioritize, and approve structure to support Marine Corps, Defense agency, and non-DOD IMA requirements. The Assistant Secretary of Defense for Reserve Affairs ensures that IMA requirements for the SECDEF and the Chairman of the Joint Chiefs of Staff (CJCS) are reviewed, validated, and approved before submitting the requirements to CMC for review and resourcing options. The CJCS reviews, validates, and prioritizes unified combatant command IMA requirements before submitting those requirements to CMC for review and resourcing options. TFSO will validate and prioritize each IMA billet request based upon the following criteria. Prioritization ensures that upon mobilization, those billets deemed critical are filled over a shorter time span. Priorities are--

1 Priority 1. Billets critical to the processing of SMCR units or individuals upon mobilization. Requests for new IMA billets must include the anticipated date that the billet will be required upon a Presidential Selected Reserve Callup or mobilization.

2 Priority 2. Billets critical to the AC in preparing a crisis response (short notice, quick operational requirement).

ENCLOSURE (2)

3 Priority 3. Billets essential to the AC under conditions of national emergency or war (a planned, staged buildup of forces).

4 Priority 4. Billets providing contributory (peacetime) support to the AC.

(2) Navy Billets. Navy billets are not funded in the same manner as Marine Corps billets and must be treated separately. A detailed description of how Navy manpower is acquired and programmed can be found in OPNAVINST 1000.16 (Manual of Navy Total Force Manpower Policies and Procedures). All Navy billets assigned to the Marine Corps are managed under the Navy's Total Force Manpower Management System (TFMMS). TFMMS is an information system designed to support the Deputy Chief of Naval Operations (DCNO) for Manpower, Personnel, and Training (N1). To satisfy this mission, TFMMS provides a single authoritative source for manpower data and the ability to track manpower resources, requirements, and authorizations for DON active duty military (officer and enlisted), Reserves, civilians, contractors, and other categories of manpower.

(a) Activity manpower document (AMD) is the qualitative and quantitative expression of Navy manpower requirements or authorizations allocated to an activity to perform the assigned mission, function, and task. It is the single official statement of organizational manning and billets authorized. Billets authorized are the billets approved by CNO for current operating conditions and may, depending on the mission of the activity, represent full organization manning.

(b) The T/O&E is the source document for all Navy manpower requirements listed on the AMD. For every line number that lists a Navy billet on the T/O&E, there should be an associated billet sequence code (BSC) on the AMD. At no time should the quantity or quality of requirements on the AMD exceed the specified requirement on the T/O&E. Each AMD is primarily identified by a five-digit unit identification code (UIC) and activity name (e.g., 67448, 1stMarDiv, Marine Corps Forces, Pacific). Therefore, an AMD may contain more than one T/O&E, with each identified by a header containing the unit name and T/O&E number.

ENCLOSURE (2)

(c) Activities may request copies of their AMD by contacting:

Commanding General
Marine Corps Combat Development Command
Total Force Structure Division (Code C-5322I)
Quantico, VA 22134-5001
DSN: 278-6079/4710 COML: (703) 784-6079/4710

(d) Navy manning is provided to the Marine Corps by the CNO through resource sponsors. Resource sponsors are OPNAV officials responsible for the program resources that constitute inputs to warfare and supporting tasks. This manning is in the form of "funding" or "end-strength" as authorized in the future years defense program. Because Congress does not pay for 100 percent of the Navy's active duty manpower requirement during peacetime, not all of the active duty Navy billet requirements are manned. This funding shortfall leaves a significant number of "unfunded" requirements which will be filled only upon mobilization. The distribution of funded billets throughout the Force is made based upon several factors, including the unit's mission, peacetime operating tempo, equipment allowances, and geographic location. Grade shaping, technical skill requirements, career development, and the ability of the Bureau of Navy Personnel to fill the billets are also considered. Every effort should be made to ensure equitable distribution of billets. Three primary methods of obtaining additional end-strength exist.

1 Reprogram end-strength from one Marine Corps activity to another. This is the quickest and most common way to fund a new requirement but results in a funded shortfall.

2 Request additional end-strength from a Navy resource sponsor. Occasionally an organization's mission will change or increase, such as the training of naval aviators and air crews by the Marine Corps. A request may be made to the DCNO (M&P) to reprogram additional end-strength into the Marine Corps. Failure to plan for future requirements is not sufficient justification to request additional end-strength from a Navy resource sponsor.

3 Submit a POM initiative to increase the Navy manpower end-strength. Such an initiative will compete against

ENCLOSURE (2)

all other POM initiatives and will require significant justification.

(e) Navy billet requests to change the quality or quantity of Navy billets within an activity, move end-strength, or request additional funded billets will be sent to the TFSO via the chain of command in the method prescribed for all T/O&E changes with the exception that a brief addition of the information listed below will be included with the justification:

FROM			EFF	TO		
<u>UIC</u>	<u>BSC</u>	<u>BIN</u>	<u>DATE</u>	<u>UIC</u>	<u>BSC</u>	<u>BIN</u>
00001	01110	1234567	9710	00001	02110	9876543

(3) Special Education Program (SEP) and Enlisted College Level Education Prerequisite Billets. Changes to billets requiring additional college or graduate level education will be in consonance with the procedures outlined for all line detail force structure changes with the additive requirement to attach a billet education evaluation certificate (BEEC) in the format contained in appendix D to this enclosure. The following BEEC considerations apply:

(a) The requesting commander, in coordination with the OccFld manager and MOS specialist, selects and enters the specific course of instruction, name and location of school(s), and the best grade and MOS desired for the T/O&E billet requirement.

(b) The requesting commander forwards the completed BEEC and T/O&E change request to the TFSO. The TFSO staffs the BEEC to the MOS specialist and CMC (MMOA-3) and CMC (MMEA) for concurrence.

(c) The TFSO approves BEEC's and forwards signed copies to appropriate MOS specialists identified in MCBul 5320.

(d) MOS specialists may recommend modifications to established billets and existing BEEC's, provided comments from affected commands are included with the request. The TFSO makes the final determination on establishing SEP billet requirements when a disagreement exists between the MOS specialist, OccFld manager, functional leader, or requester.

ENCLOSURE (2)

(e) CMC (MMOA-3) and CMC (MMEA) maintains a list of trained Marines by academic discipline, publishes a listing of disciplines for which applications from interested Marines will be accepted, and convenes an annual selection board to review the applications and records of officers and enlisted Marines applying for advanced education programs.

(4) Civilian Billets. Requesting commanders will submit line detail change requests for all changes to civilian billets whether these billets are funded by the activity or reimbursed from other sources. Civilian billets will not be placed on operating force T/O&E's. Requesting commanders will prepare a separate T/O&E change request for civilian billets.

(5) General Officer Billets. Position descriptions are required for all general officer billet additions, deletions, or modifications per MCO 5311.4 (The Establishment of, Changes to, and Revalidation of General Officer Billets).

(6) Joint and External Billets. Requests for changes to joint or external billets will be processed in accordance with the procedures specified in this Order. However, additional HQMC agency and billet coordinator actions are contained in MCO 5320.16 (External Marine Corps Billets).

e. Equipment Allowance Changes

(1) Logistic Management Information System (LMIS). LMIS contains official equipment allowances for each Marine Corps organization's T/O&E. The creation of a new T/O&E or modification to an existing document should only be requested when a unit's mission changes; when a new T/O&E is created; when there is a change to doctrine, training, or facilities and support within the CBRP; or when a change is necessary to enhance safety to personnel or equipment. Initial allowances for new equipment and modifications to allowances of existing items will be established or changed given force structure policy contained in paragraph 6 of the basic Order. Actual fielding or redistribution of equipment falls under the cognizance of the MLCM process.

(a) LMIS was originally designed for the HQMC staff as a system supporting management and periodic review of principal end items of equipment and ammunition for the Planning, Programming, and Budgeting System. Since its development in the

ENCLOSURE (2)

14 JAN 1999

late 1970's, the use of LMIS has expanded to provide management information for many logistic functions that fall outside the budget environment. Other information systems such as MAGTF II, Asset Tracking for Logistics and Supply System (ATLASS) and Materiel Capability Decision Support System (MCDSS) were developed using the source information in LMIS files. Through personal computers, LMIS users have access to up-to-date and accurate logistic information.

(b) LMIS is separated into two files, the equipment allowance file (EAF) and the item data file (IDF). Changes to force structure primarily impact the EAF, and the appropriate procedures for requesting those changes are provided in the following paragraph. COMMARCORSYSCOM enters item descriptive data into the IDF as information becomes available during the procurement cycle. All data elements in the IDF are essential to fully identify the items of equipment, which are included in the LMIS and the NAVMC 1017 (Table of Authorized Materiel).

(2) EAF Change Procedures

(a) Active and Reserve operating force, supporting establishment, and staff agency commanders may originate equipment allowance change requests. Force commanders must obtain concurrence and/or comments from all like-unit force commanders before submitting the request to the TFSO.

(b) TFSO logs received equipment allowance change requests, verifies the current allowance quantities, and staffs requests for comments and recommendations concurrently to the appropriate functional leader(s) and other DOTES elements (i.e., Doctrine Division, Training and Education Division, and Requirements Division, MCCDC; DC/S I&L (LP/LF); COMMARCORSYSCOM; and COMMAR-CORLOGBASES.

(c) Functional leaders and DC/S I&L conduct an assessment of requests to include, but not be limited to, the following areas:

1 T/O&E realignment required by the request and review of logistic policy for the items of equipment requested.

ENCLOSURE (2)

2 The possibility of sourcing equipment from within the operating forces or supporting establishment to satisfy requested equipment allowance increases.

3 The impact on MOS, grade shaping, and structure of other common module units, including those in the Reserves.

4 The impact on availability and use of facilities. (Only DC/S I&L [LF] comments and recommendations are required.)

(d) Requirements Division, MCCDC, evaluates each request based on the operational requirements of the organization and examines alternatives to an equipment solution (i.e., changes to unit doctrine, mission, organization, manpower, or use of other than requested equipment). Requirements Division will also evaluate the impact of requested equipment increases or decreases on the unit's air, sea, and ground-lift requirement.

(e) COMMARCORSYSCOM and COMMARCORLOGBASES conduct an equipment supportability review of the T/O&E change request to consider the potential impact of requested equipment increases or decreases. Review considerations include--

1 Increases or decreases to support and maintenance equipment which may be associated with the equipment cited in the change request.

2 Interface of other unit allowances with equipment addressed in the change request.

3 Availability and/or procurability of assets to support requested equipment increases (e.g., redistribution from within the Force or whether the item is still in production).

4 Availability of Marine Corps funding for equipment increases.

5 Impact on expected O&MMC and O&MMCR funding.

(f) TFSO approves or disapproves the request based on the comments and recommendations received and on the following additional considerations:

ENCLOSURE (2)

1 The overall impact of associated T/O&E increases or decreases on Marine Corps Forces and MAGTF elements (i.e., additional or fewer operators or maintenance personnel for requested increases or decreases of equipment).

2 Alternatives to an equipment solution (i.e., changes to unit doctrine, mission, organization, manpower, or use of other equipment).

3 Addition or deletion of training requirements.

4 Identification of equipment within the operating forces as a possible solution to satisfy an equipment increase request.

(g) CMC (DC/S's P&R and I&L), CG MCCDC, COMMARCORSYSCOM, and COMMARCORLOGBASES determine jointly the sourcing of all approved changes to the existing equipment allowance.

(h) COMMARCORSYSCOM develops required POM initiatives based upon requirements determined by Requirements Division. Pending approval of fielding initiatives, COMMARCORSYSCOM loads the approved acquisition objective (AAO) allowances in LMIS as planned allowances. If equipment requirements become invalid, the invalid equipment allowances will be deleted from LMIS, and the POM initiative will be canceled.

5. Information System Design Administrative Changes. Changes to the T/MR and EAF are often required to modify billet data or equipment allowances because the current information system design does not update information automatically.

a. The TFSO enters modifications to billet data and then documents and identifies corrected discrepancies (e.g., invalid MOS's, missing or invalid RUC's, and other administrative codes).

b. COMMARCORSYSCOM identifies equipment allowances to be loaded initially. The TFSO modifies those allowances thereafter.

(1) Marine Corps Forces, base, and station commanders; COMMARCORSYSCOM; and COMMARCORLOGBASES can submit requests for conversion of planned to actual allowance any time during the year. The conversion request must be submitted using the format

ENCLOSURE (2)

provided in appendix B to this enclosure, and must be based on the data contained in the most recent EAF (previous 30 days).

(2) COMMARCORSYSCOM or COMMARCORLOGBASES will submit changes to the EAF or to IDF table of authorized materiel control numbers (TAMCN) that do not require concurrence from other agencies. T/O&E change request form, appendix B, is used for these submissions. The TFSO will ensure all agencies involved with modifications of this nature are notified.

(3) DC/S I&L will publish changes to equipment allowances of the maritime prepositioning force/ships (H-, I-, J-series equipment lists) and the Norway air landed Marine expeditionary brigade yearly following the annual tailoring conference. The TFSO will ensure LMIS files reflect the published allowances.

(4) COMMARCORSYSCOM or COMMARCORLOGBASES will submit requests to delete items contained in LMIS using the format in appendix B. TFSO will enter changes and notify major subordinate commands, COMMARCORLOGBASES, COMMARCORSYSCOM (PM TMDE, DFM), and DC/S I&L (LP, LPP) after changes are made.

6. T/O&E Change Request Preparation and Submission Requirements

a. Include a mission statement with the T/O&E change request. A sample mission statement, appendix A, and T/O&E change request form, appendix B, are provided in this enclosure. An electronic file copy of these formats can be obtained from Lotus Notes server MQGCDC01_LN/QUANTICO/USMC, from the TFSO Internet website <http://138.156.112.14/tfsd/tfsd.html>, or by request from the TFSO. Forward request for electronic copies by e-mail to the TFSO at Banyan address: CG MCCDC VA OMB@TFS DIVISION@MCCDC or Internet address:

quanticoc@quantico.usmc.mil

b. Prepare the mission statement in Lotus AmiPro or WordPro word-processing format (Courier font, 12 point). Use Revision Marking under the Tools menu to annotate proposed changes.

c. Prepare the T/O&E change request using the format provided in appendix B as prescribed above or in the interactive T/MR using an IBM 3270 or compatible terminal. Code descriptions to be used on the form are published in the T/MR and LMIS users

ENCLOSURE (2)

manuals which can be obtained from TFSO. When using the interactive T/MR method, the justification and equipment sections of the T/O&E change request form must be completed and forwarded to TFSO as an attachment to e-mail.

d. Forward the proposed mission statement and T/O&E change request as e-mail attachments to TFSO via the chain of command.

e. Send information copies by e-mail to like-unit commanders for comments. Like-unit commanders will forward comments to TFSO, who in turn staffs the request to applicable process participants and to each DOTES element for comments and supportability assessments.

7. Automated Data Processing (ADP) Support

a. To find additional force structure information as well as current and future billet requirements, go to the following force structure Internet site:

<http://138.156.112.14/tfsd/tfsd.html>

b. On-line users may request the TFSO to create a mainframe data set of requested T/O&E's or MOS extracts in transaction format for use by units. An on-line user may either download the data to a personal computer using time sharing option (TSO) or request an electronic transfer of data via the Marine Corps Data Network or as an e-mail attachment. TFSO forwards the data as an ASCII DOS text file unless another file type is specified. Electronic copies of equipment allowance data may be requested from the local Supported Activities Supply System (SASSY) management unit.

c. A transaction checklist may be prepared or modified using either TSO or Remote Operating System Conversational Operations Environment. On-line users must request access through the TFSO for the capability to execute the transaction checklist program. The transaction checklist provides a checklist of the transactions as well as a list of any transactions that fail format or content edits. This ensures that properly formatted transactions are submitted to the TFSO and minimizes the need for resubmission of T/O transactions.

ENCLOSURE (2)

MCO 5311.1C
14 JAN 1999

d. The on-line user must have access to the Quantico mainframe BATCH files to produce a transaction checklist or to view LMIS T/O&E files. Access is available to on-line users at all command levels and can be obtained from TFSO. Questions relating to ADP access should be directed to the TFSO, Com1 (703) 784-6184/6188 or DSN 278-6184/6188.

ENCLOSURE (2)

MCO 5311.1C
14 Jan 1999

SAMPLE MISSION STATEMENT



UNITED STATES MARINE CORPS
HEADQUARTERS UNITED STATES MARINE CORPS
2 NAVY ANNEX
WASHINGTON, DC 20380-1775

TABLE OF ORGANIZATION
NUMBER.....XXXXX
OF EQUIPMENT
NUMBER.....XXXXX

MUST BE COURIER NEW/12 PITCH
Sample is in 8 pitch for consolidation purposes

UNIT TYPE
ORGANIZATIONAL TABLE
HEIRACHY
(WHO DO THEY
WORK FOR?)

1. PROMULGATION STATEMENT. Insert here the statement "This Mission Statement prescribes the organizational structure, manpower, and equipment requirements for (complete unit type) to accomplish its wartime mission."

2. ORGANIZATION. Identify here the major sub-elements of the organization being defined. Organizational Elements should be consistent with those contained within the Table of Organization.

3. MISSION AND TASKS

a. Mission. The mission statement is a concise statement of the unit's war-fighting responsibilities in relation to other organizations and it describes the unit's role in support of MAGTF, Supporting Establishment and Joint Operations. This paragraph should speak to such questions as "Who, What, When, Where and Why."

b. Tasks. These are specific statements that address the "how" part of the mission statement. It speaks to the wartime functions for which the unit is responsible for conducting. List tasks normally assigned to sub-elements in separate, numbered subparagraphs. Tasks must be delineated with enough specificity to ensure that all sub-elements of an organization are justified. Tasks will be listed in order of priority or accomplishment. Tasks must not be too detailed as to degrade commander's flexibility. Tasks need to complement the unit's Mission Essential Task List (METLs), Training and Readiness Manuals, (if applicable) and doctrinal publications.

4. CONCEPT OF ORGANIZATION. Describe in detail how the unit is organized to accomplish its wartime mission. Provide a general description of how the unit will organize, deploy, employ, and sustain forces to accomplish the mission. It should include a narrative of actions the unit will likely take. Include as appropriate task organization, detachments, required augmentation, reserve requirements, etc.

5. CONCEPT OF EMPLOYMENT. Document the operational capabilities of the unit in terms of the six major war-fighting functions: Maneuver, Intelligence, Fires, Logistics, Command and Control and Force Protection. Specify if those primary functions are performed by other organizations or not applicable to that unit. Emphasis is upon wartime capabilities, what the unit brings to the fight and how it meets the objectives of the Force Commander. As the Fifth Element of the MAGTF, Bases and Stations will include the following statement under this Paragraph: Provide individual augmentation to Marine Corps Operating Forces and Supporting Establishment to meet operational contingencies.

6. ADMINISTRATIVE CAPABILITIES. State whether administration is organic or from what organization administrative support will be received. (For example: Personnel administration is conducted at the Consolidated Personnel Administrative Center (CPAC)).

7. LOGISTIC CAPABILITIES. This addresses internal logistic capabilities (to include aviation logistic capabilities) and a unit's ability to sustain itself. If a paragraph does not apply, put the word "None" after the paragraph title.

a. Maintenance. State whether maintenance is organic or from what organization maintenance support will be received. Ensure that level of maintenance authorized is specified.

Appendix A to
ENCLOSURE (2)
Ch 1 (25 May 04)

MCO 5311.1C
14 Jan 1999

b. Supply. State whether supply is organic or from what organization supply support will be received.

c. Transportation. State whether transportation is organic or from what organization transportation support will be received.

d. General Engineering. State whether general engineering is organic or from what organization general engineering support will be received.

e. Health Services. State whether health services are organic or from what organization health services support will be received.

f. Services. Services include legal, disbursing, postal, exchange and mortuary affairs. State whether services are organic or from what organization services will be received.

g. Messing. State whether messing is organic or from what organization food service support will be received.

8. COMMAND AND SIGNAL.

a. Command Relationships. Provide a general narrative describing the unit's command relationships and, if applicable, existing memorandums of understanding or those that require development.

b. Communications and Information Systems. Provide a general narrative describing the unit's concept for the communications and information systems. Highlight any communication or information system procedure or restriction requiring special emphasis.

9. SUPERSESSION. Insert the statement "This Table of Organization supersedes Table of Organization number (number) of (Date) and is effective upon receipt." Or, "This is a new T/O and is effective upon receipt."

Appendix A to
Enclosure (2)
Ch 1 (25 May 04)

14 JAN 1969

T/O & E CHANGE REQUEST
NAVMC 11355 (1-98) (EF)
SN: 0109-LF-071-0000

Ref: MCO P5311.1C

Complete A Separate Change Request for EACH T/O & E

DATE:

T/O & E TO BE MODIFIED (List both T/O and T/E Number)	UNIT IDENTIFICATION CODE (UIC) OF UNIT	ACTIVITY ADDRESS CODE (AC) OF UNIT
---	--	------------------------------------

DOES THIS CHANGE IMPACT UNIT MISSION?
(mission statement to this request.)

IF YES, EXPLAIN BELOW. (Provide brief narrative of change and attach revised

DOES THIS CHANGE IMPACT BILLET REQUIREMENTS?

IF YES, COMPLETE BELOW. (List current billet line detail information,

then proposed detailed changes per codes listed in the T/MR users manual. If yes, complete below. (List current bill line item information, line change desired. Information may be attached as a spreadsheet, modified electronic copy of the T/O, or inserted into this area of the form. At a minimum, the following elements must be included)

QTY	MCC	BIC	COMPENSATION
-----	-----	-----	--------------

[illegible]

DOES THIS CHANGE IMPACT EQUIPMENT ALLOWANCES?
(for each item.)

IF YES, EXPLAIN BELOW. (Repeat all information required below

ITEM DESCRIPTION: (Repeat the item description and all information provided below for each item. Either expand space in this area as necessary or submit the information listed below in spreadsheet format. Identify compensatory adjustments by T/E and TAMCN.)

TAMCN
(Complete TAMCN required to
include Supply Class)

NSN

NOMENCLATURE (Complete
Nomenclature to include Model Number)

AUTHORIZED

	ALLOWANCE QUANTITY
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	11
12	12
13	13
14	14
15	15
16	16
17	17
18	18
19	19
20	20
21	21
22	22
23	23
24	24
25	25
26	26
27	27
28	28
29	29
30	30
31	31
32	32
33	33
34	34
35	35
36	36
37	37
38	38
39	39
40	40
41	41
42	42
43	43
44	44
45	45
46	46
47	47
48	48
49	49
50	50
51	51
52	52
53	53
54	54
55	55
56	56
57	57
58	58
59	59
60	60
61	61
62	62
63	63
64	64
65	65
66	66
67	67
68	68
69	69
70	70
71	71
72	72
73	73
74	74
75	75
76	76
77	77
78	78
79	79
80	80
81	81
82	82
83	83
84	84
85	85
86	86
87	87
88	88
89	89
90	90
91	91
92	92
93	93
94	94
95	95
96	96
97	97
98	98
99	99
100	100

ON-HAND

RECOMMENDED

JUSTIFICATION

JUSTIFICATION

(Justification must be detailed enough to specify the change to unit doctrine, mission, organization, concept of employment, or demonstrated deficiency of present T/O & E necessitating change request. Each billet or item change must be addressed in the narrative.)

Designed Using FormFlow 1.1, HQMC/ARAE, Jan 1998

Appendix B to
ENCLOSURE (2)

FACT AND JUSTIFICATION SHEET
SAMPLE FORMAT

1. Fact Sheet on: _____
(Name of activity)
- _____
- (Unit Address)

2. Background and Mission

State mission as approved by appropriate authority. Additionally, provide any useful or significant historical information, state precisely the location of the unit either as in a major city or by distance and direction from a major city, and include any other matter of general interest or significance. Content of this paragraph will vary with the character of the action.

3. Nature of Action

This paragraph should briefly answer the questions, "What and When?". It should state the specific type of action(s), i.e., "To establish/activate (name of activity) on (effective date)"; "To disestablish/deactivate (name of activity) on (effective date)"; or "To relocate the (name of activity) from (enter present location) to (enter new location) on (enter effective date)".

4. Reason for the Action

This paragraph should explain briefly why the action is necessary. It should set forth the basic facts and outline the rationale and justification for the planned action(s). This paragraph will be useful only to the extent that it anticipates and answers all questions and objections. Indicate, when applicable, if the action(s) improve efficiency or generate savings.

Appendix C to
ENCLOSURE (2)

5. Impact of the Action

The form and content of this paragraph will be determined by the nature of the action(s) and whether it affects doctrine, organization, training and education, equipment, facilities and support, or any combination thereof. Make appropriate adaptations to fit the actual situation.

a. Civilian Personnel

Number of authorized ceilings as of (insert date).

Number of permanent on-board employees as of (insert date).

Estimated annual total civilian salaries.

Number anticipated reduction-in-force separations.

Number anticipated attrition through (enter completion date).

Number of employees to transfer to other activities within the area.

Number of employees to transfer to other activities outside the area.

Number of employees to be increased.

b. Military Personnel (to include Marines and Navy both active and reserve)

Current T/O&E: Officers/Enlisted.

Current Authorized Manning: Officers/Enlisted.

Current On Board: Officers/Enlisted.

Appendix C to
ENCLOSURE (2)

Number of billets to be retained as a result of action:
Officers/Enlisted.

Number of billets to be transferred to other activities
within the area: Officers/Enlisted.

Number of billets to be transferred to other activities
outside the area: Officers/Enlisted.

Net manning increase/reduction: Officers/Enlisted.

c. Equal Employment Opportunity Impact

Total Number Permanent Work Force (On-board strength)

	Caucasian	Black	Hispanic	Other
<u>Male/Female (M/F)</u>	<u>M/F</u>	<u>M/F</u>	<u>M/F</u>	<u>M/F</u>
(Enter Numbers-----)				

Total Number Affected

	Caucasian	Black	Hispanic	Other
<u>Male/Female (M/F)</u>	<u>M/F</u>	<u>M/F</u>	<u>M/F</u>	<u>M/F</u>
(Enter Numbers-----)				

d. Facilities and Support Data

When a physical installation is affected, the following
information, as appropriate, should be included:

(1) Land area (including building sites) - (number of
square feet)

(2) Value of plant account - Building(s) (\$ amount)
- Equipment (\$ amount)
- Total (\$ amount)

Appendix C to
ENCLOSURE (2)

(3) Maintenance and operating costs by FY: Present (FY____) and \$ amount; last (FY____) and \$ amount; and next (estimated (FY____) \$ amount.

(4) Estimated curtailment or acquisition costs, by FY.

(5) Predominate type of building construction and whether permanent, semi-permanent, or temporary.

(6) Property disposition or acquisition plans or procedures.

(7) Occupy (insert number of square feet) space under a host-tenant agreement with the (name and location of host activity).

(8) Occupy (insert number of square feet) space under lease agreement with the (name and location of owner) and indicate amount of rent, or if no rent is charged, stipulate the reason for no costs being involved.

e. Operating Forces Data

(1) Numbers of officer and enlisted personnel involved.

(2) Estimated annual military salaries of personnel involved.

(3) Estimated number of dependent families at current location of unit involved, and identify number requiring movement as a result of action.

(4) Number and type of units at the losing and gaining locations after the completion date.

(5) Housing unit availability and occupancy rates at both the losing and gaining commands.

(6) Bachelor officer and enlisted quarters availability and occupancy rates at both the losing and gaining commands.

Appendix C to
ENCLOSURE (2)

14 JAN 1999

f. Equipment. List Type I T/O&E equipment allowances required, either increases, decreases, and/or transfers with estimated costs associated with procurement or shipping. Identify source of funding for all associated equipment costs.

g. Funding. Anticipated savings versus cost of proposed action (show method of calculation).

6. Assistance to Affected Civilians. Identify efforts to assist displaced employees such as placement assistance, coordination with DOD Office of Personnel Management, liaison with the Department of Labor, state employment offices, and private industry.

7. Anticipated Congressional Interest. Provide a synopsis of any inquiries received by public officials pertaining to the force structure action.

8. Labor Organizations Affected. Identify any civilian labor or contractual business relations impacted and any concerns regarding union affiliation.

9. Anticipated environmental compliance impact. Given state and local statutes and regulations, provide an estimated timeline and cost of closing a location permanently.

10. Point of Contact: DSN and Commercial Telephone number and e-mail account.

/s/

Appendix C to
ENCLOSURE (2)

SAMPLE BILLET EDUCATION EVALUATION CERTIFICATE

BILLET EDUCATION EVALUATION CERTIFICATE (1500)			Ref: MCO P5311.1C	
NAVMC 11345 (5-97)				
SN: 0109-LF-088-0100				
Complete a separate Certificate for EACH billet				
TID NUMBER	TID LINE NUMBER	BILLET TITLE/ORGANIZATION LOCATION	MOS	REQUIRED BY FY
			98	1920
DESIGNS POSITION DESCRIPTION NO.				
CURRICULUM SHOULD INCLUDE (but not be limited to) the following:				
JUSTIFICATION (Simple, brief narrative explaining why the occupant of the billet requires the special education described. What does he do with the knowledge? How does he employ it?)				
SPECIAL EDUCATION DISCIPLINE (Select the course of instruction and alternate to be attended which best fits the exact requirement of the billet)				
RECOMMENDED LENGTH (years)				
EDUCATION PREREQUISITE (MCO 1530.3)				
NECESSARY				
DESIRABLE				
SIGNATURE OF ADVOCATE or DCE/ED Manager CODE/DATE			SIGNATURE OF MOS Specialist CODE/DATE	
CG MCCDC DECISION				
APPROVED:		DATE	DISAPPROVED: DATE	
FOOTNOTE:				

Caution: Insert additional space necessary. Precede each continuation with main caption, i.e., "Continuation of sub heading ..." include.

Designed Using FormFlow, NOMCIARAE, May 97

Appendix D to
ENCLOSURE (2)

14 JAN 1999

GLOSSARY OF ACRONYMS AND TERMS

1. Activation. The establishment or reestablishment of an operational force organization with its associated billet requirements and equipment allowances. Units are designated "activated" once reflected on the troop list with associated manning for a specified effective date and the MCBul 5400 is published authorizing the activation. Activation is synonymous with the term "establishment" for supporting establishment organizations.
2. Activity Manpower Document (AMD). The qualitative and quantitative expression of Navy manpower requirements or authorizations allocated to an activity to perform the assigned mission, function, and task.
3. Authorization. A billet requirement that is funded by the Navy. Requires related end-strength to be defined before authorization can be applied.
4. Authorized Strength Report (ASR). A recapitulation by grade and MOS, of those T/O billets authorized for each MCC based on the manning level assigned by the TFSO on the total force troop list. The ASR serves as the source for both enlisted and officer staffing goal models as well as the target force planning model, often referred to as the grade adjusted recapitulation (GAR). Actual on-board strength is a function of authorized end-strength, manning, and available inventory.
5. Aviation Combat Element (ACE). The ACE consists of Marine aircraft group, Marine aviation logistics squadron, Marine wing support group, Marine air control group, fixed- and rotary-wing squadrons, Presidential support, support to Reserve aviation units, and training squadrons and units.
6. Billet. A specific manpower space which is assigned qualifiers that define the duties, tasks, and functions to be performed, and the specific skills and skill level required to perform the delineated functions.
7. Billets Authorized. A funded Navy manpower space which has been authorized by CNO. (Authorized billets are identified in the manpower resource code (MRC) block of the AMD)

ENCLOSURE (3)

14 JAN 1999

8. Billet Identification Number (BIN). A seven-digit number in the Navy manpower system permanently assigned to each billet, header, or note within the Navy's Total Force Manpower Management System.

9. Billet Sequence Code (BSC). A five-digit number assigned to organizationally structured billets, headers, and notes within an individual Navy AMD.

10. Claimant. See manpower claimant.

11. Combat Development System (CDS). A formal system of processes and functions that identify, develop, acquire, field, and sustain, essential integrated capabilities based on fundamental concepts which meet the needs of the Marine Corps and commanders in chief.

12. Combat Service Support Element (CSSE). The CSSE consists of force service support group battalions: headquarters and service, maintenance, supply, engineer, support, landing support, motor transport, medical, and dental battalions as well as reserve CSSE units. This includes active duty support to reserve units.

13. Command Element (CE). The CE consists of force, MEF, and Marine expeditionary unit headquarters; surveillance, reconnaissance, intelligence group subordinate units (intelligence companies, air/naval gunfire liaison company, communications battalion, and radio battalions as well as reserve CE units). This includes active duty support to MARFORRES headquarters.

14. Common Module. A T/O&E used by more than one unit, having the same series T/O&E number, same mission statement, and the same billet requirements and equipment allowances. Common modules enhance Marine Corps capability to globally source forces for combatant commanders.

15. Compensation. The identification of a billet or item of equipment for deletion, by T/O&E and line number or TAMCN, when T/O&E modification involves increases in billet or equipment totals, grade levels, and/or type changes that have not been approved in the POM process. The compensation must be of the same type (i.e., military officer for military officer, enlisted for enlisted, and Navy for Navy), and must fit within acceptable grade shape parameters for the MOS's involved.

ENCLOSURE (3)

14 JAN 1999

16. Deactivation. Operating force units are deactivated when zero-manned and equipment is redistributed or declared excess. These units are reflected with zero structure and zero manning on the troop list for the scheduled deactivation year. Force structure for a deactivated unit is either eliminated or reallocated. Force structure disposition must be authorized by a MCBul 5400. Deactivation is synonymous with the term "disestablishment" for supporting establishment organizations.
17. Disestablishment. Used in place of the term "deactivation" for supporting establishment units and organizations. Refer to the definition of "deactivation" for implications on the troop list and requirement for publication of a MCBul 5400.
18. End-Strength. The number of active-duty military and civilian personnel in the Navy and Marine Corps on the last day of the accounting period (30 September).
19. Equipment Allowance. That quantity of an item required to be on hand or on order by a unit as authorized by the unit's T/O&E and other allowance type publications or directives, unless specific authorization is provided by higher headquarters.
20. Equipment Allowance File (EAF). A file within LMIS which provides authorized allowances by T/E for asset management.
21. EAF Challenge. An EAF challenge is a request initiated by a unit to modify the current EAF based upon a change to the most current quarterly update.
22. Establishment. Used in place of the term "activation" for supporting establishment organizations. Refer to the definition of "activation" for implications on the troop list and requirement for publication of a MCBul 5400.
23. External Billet. A billet at an activity external to the Marine Corps which is considered chargeable Marine Corps force structure which the Marine Corps is responsible for manning and staffing.

ENCLOSURE (3)

14 JAN 1999

24. Fleet Marine Force Personnel Assistance Program (FAP). The use of operating forces military personnel to support the base or station commander in accomplishing workloads resulting from the presence of an operating forces unit. The number of supporting military billets filled by FAP reflects the support required from the tenant operating forces commander during periods of full occupancy. The base or station and the operating forces commander negotiate the authorized billets through a written agreement.

25. Force Structure. Force structure refers to the number, size and composition of Marine Corps units (expressed in terms of T/O&E's) required to perform the Marine Corps mission. Programmed force structure evolves from the MCMP, is refined through the POM process, and is approved as a final output of the POM. Programmed force structure is developed for each of the program years. Force structure includes unit requirements for both manpower and equipment resources.

26. Functional Leader. An individual responsible for managing an organization with expertise in a particular functional area. This person retains the authority to direct, decide, and delegate work products, projects, and staff resources of the functional organization, but must substantially contribute personnel and effort to meeting process goals and the requirements of the Combat Development System.

27. Funded Billet. Navy manpower as authorized in the future years defense program (FYDP) with billet quantity assigned.

28. Future Years Defense Program (FYDP). The official program which summarizes the SECDEF approved plans and programs for DOD. The FYDP is published at least once a year. The FYDP is also represented by a computer data base which is updated regularly to reflect budget decisions and reprogramming actions.

29. Ground Combat Element (GCE). The GCE consists of division headquarters, infantry, artillery, tank, amphibious assault vehicles, light armored reconnaissance, and combat engineer battalions, as well as reserve GCE units. This includes active duty support to those units.

ENCLOSURE (3)

14 JAN 1999

30. Item Data File (IDF). The IDF within the LMIS contains procurement, supply, and technical data pertaining to major end items of equipment.

31. Letter of Allowance (LOA). The LOA is a document that provides activities a civilian personnel profile that includes their full-time equivalent (FTE) targets. The LOA is compiled from activity input. Each activity is requested to provide its civilian personnel FTE profile prioritized, relative to the workload they can accommodate within their total available resources. It also displays current profiles and estimates through the FYDP, and the data are normally provided to each activity after each budget submission, normally three times a year.

32. Man-year. A man-year is a restatement of military end-strength, taking into account the difference between accessions, retention, and attrition based on the requirement to meet authorized end-strength on 30 September. Man-years, when calculated, historically have been lower than the end-strength authorized.

33. Manning. That portion of force structure which, within manpower and budgetary constraints, is authorized to be filled. Manning is determined by taking authorized end-strength, converting end-strength to man-years, and subtracting estimated P2T2.

34. Manpower Claimant. In the Navy Resource Management System, the major commanders or bureaus which are authorized manpower resources directly by the CNO for accomplishment of the assigned missions and tasks. CMC is designated as Claimancy 27.

35. Military Occupational Specialties (MOS) Specialist. MOS specialists are designated by and directly support the OccFld manager. As a technical advisor to the OccFld manager, the MOS specialist's skill and knowledge are critical in providing accurate and productive information to effectively classify, train, and establish the billet requirements for that MOS.

36. Mobilization. The process by which the Armed Forces or part of them are brought to a state of readiness for war or other national emergencies. This includes the assembling and organizing of personnel, supplies and material for active military

ENCLOSURE (3)

service. Mobilization requirements must be identified on the T/O&E to ensure a smoother transition during war

37. Monitored Command Code (MCC). A code assigned by CMC (MI) to each command, unit, activity, or individual billet to which military personnel are assigned.

38. Occupational Field (OccFld) Manager. OccFld managers are assigned by their respective DC/S, AC/S, or department head/division director of HQMC, MCCDC, and COMMARCORSYSCOM. OccFld managers are the focal point for OccFld management and MOS development. They manage assigned OccFld and MOS's, exclusive of personnel assignment.

39. Operating Forces. Operating forces include all elements of the MAGTF as well as other operational special purpose forces such as the Marine Security Guard Battalion and the Marine Corps Security Force Battalion.

40. Planned Allowances. Allowances which are required for which funding or new equipment procurement prohibits the delivery of the asset until a future year. Planned allowances are entered into the LMIS once the user's logistic support summary (ULSS) is published. Planned allowances are converted to actual allowances once the equipment is received, and the unit requests a change of status of the equipment from planned to actual.

41. Program Objective Memorandum (POM). A biennial document in which each military department and Defense agency recommends and describes its total resource and program objectives. Program objectives are fiscally constrained. To allow flexibility for each Service to develop balanced programs, reallocations of funds is permitted between major mission and support categories unless specifically stated otherwise in the SECDEF Fiscal Guidance Memorandum.

42. Reorganization. Reorganization effects the realignment of structure within given T/O&E's. Frequently, reorganization is required as a result of a change in mission or T/O&E, or to compensate for force structure activations or deactivations.

43. Requirement. A statement of the quantity and quality of Navy, Marine, or civilian manpower needed to perform required operational capabilities in a projected operational environment.

ENCLOSURE (3)

14 JAN 1999

These requirements are derived from the USMC T/O&E and are displayed in the total force troop list as well as the Navy AMD.

44. Site-Lining. The distribution of a unit's line numbers to specific permanent (365 days-a-year) sites, whether done in the Active or Reserve Component. Site-line distribution requires a T/O&E change request and reserve recruiting plans are modified when a line number is moved from one unit location to another. Movement of line numbers resulting in the relocation of a platoon or larger requires a Marine Corps 5400 series bulletin and a F&J letter to authorize the unit relocation.

45. Special Allowances. Special equipment allowances may be granted by Marine Corps forces commanders to units that have a temporary need for non-controlled items when the current unit assets are insufficient to meet the need, or temporary in nature, and the unit has no assets available to perform the task required. Distribution of assets will be considered prior to special allowances being approved. Special allowances will be granted for a period of one year or less. Should a special allowance be required beyond this period, the unit will submit a request for MOA as per this Order. Special allowances are intended to be a temporary addition to T/O&E allowances. Special allowances also may be granted when a unit has received early fielding of a controlled item prior to publication of the materiel fielding plan. Upon publication of the ULSS, the allowance will be converted from planned to actual allowance and the special allowance will be deleted.

46. Staffing Goal. A staffing goal is a computer-generated assignment target by MCC which provides an ideal distribution of grades and skills in accordance with inventory availabilities and current distribution policies.

47. Supporting Establishment (SE). The SE includes bases, stations, external billets, and civilian and military billets that are not organized under the operating forces. The SE provides the development, procurement, training, administration, and logistics required to perform the Marine Corps mission. In addition to bases, stations, and individual billets, the SE also consists of formal schools, academies, and schools of infantry.

48. Table of Authorized Materiel Control Number (TAMCN). The TAMCN is an alphanumeric designator which identifies an item of

ENCLOSURE (3)

14 JAN 1999

combat equipment. The TAMCN consists of three elements: the commodity designator, the item number, and the class and subclass of supply. Definitions of these codes are provided in the LMIS users manual produced by TFSD.

49. Table of Manpower Requirements (T/MR). The T/MR is an automated system which captures and displays approved Marine Corps T/O's, T/O mission statements, and other associated data. The current year (staffing year) plus 6 out years are depicted. Definitions of codes resident in the T/MR are available in the T/MR users manual produced by CG MCCDC (TFS).

50. Table of Organization and Equipment (T/O&E). A T/O&E describes the organizational manpower requirements in terms of grade, MOS, series, weapon, and billet title for civilian and military personnel. It is a basic document that describes, in billet line detail, the composition of every Marine Corps organization. The T/O&E is also an equipment allowance document which lists items required by the organization to perform their wartime mission by table of authorized materiel control number.

51. T/O&E Change Request. Request to modify organization or equipment allowances submitted when changes in doctrine, concepts of employment, safety, mission, or organization support the requested change in allowances.

52. T/O&E Mission Statement. A T/O&E mission statement describes the mission and tasks, organization, concepts of organization and employment, and administrative and logistic capabilities of Marine Corps organization. A mission statement is an integral part of a T/O&E.

53. Total Force Structure Owner (TFSO). The TFSO is the focal point for all force structure planning and development, including those initiatives directed by Congress, SECDEF, and DOD, e.g., through the implementation of quadrennial defense review recommendations.

54. Total Force Troop List. The troop list is a planning document that displays Marine Corps structure with respective allocations of programmed manning. It is comprised of the approved T/O&E's and the total projected officer and enlisted manning. The troop list covers the FYDP: the current year, the budget year, and the out years. Each year is depicted as a

ENCLOSURE (3)

MCO 5311.1C
14 JAN 1999

beginning-of-each year view. Geographical location and other details are included for use in updating the FYDP. The troop list is the basic document used to develop current and out-year manpower and equipment planning documents.

ENCLOSURE (3)